

The changing health landscape

Embracing a new approach

December 2020



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Foreword

“ The COVID-19 pandemic has changed our lives in many different ways, but how we view and manage our health is an area that’s been brought into particularly sharp focus.

Not only are we more aware of our health needs and our potential vulnerability to Coronavirus, we’re conscious that NHS waiting times for appointments and treatment may be longer than they were before.

With this in mind, prevention could be the best course of action. If we’re proactive in understanding our health and taking the necessary steps to either get or stay healthy, we can reduce the need to access traditional NHS resources.

Of course, the longer-term effects of having COVID-19 are still being understood, so this report considers the more immediate effects of the pandemic.

Over 2000 individuals were interviewed to find out how the pandemic has changed the way they feel about their physical and mental health - and about how they access support. ”

Dr Doug Wright,
Medical Director, Aviva



Thought 1: A new relationship with our health

Has the pandemic changed the way we view our health – both mental and physical - and the measures we take to protect it? Are we more conscious now about the importance of looking after ourselves and others? And what are the implications for our mental health? Let's look at the concerns and worries that have been brought to the forefront, and see if lockdown has changed our attitude to diet and exercise.

How are we looking after ourselves during the pandemic?

From joining Joe Wicks on YouTube for a daily workout to growing our own vegetables, exercise and healthy eating are the most common ways people are taking care of themselves. Our research found that generally, people are keeping an eye on their health, with those aged 45-54 most likely to be feeling the burn and the 55+ group most likely to be eating healthily. When asked if they'd made health changes since the first lockdown began, it was the 16-24 age group leading the way. This suggests that the older age groups are maintaining their existing lifestyles without feeling the need to make changes in lockdown, whereas the younger group recognised a need to form some new habits.

Encouragingly, the research shows that overall, nearly **90%** of those who have made health changes since lockdown believe they'll continue them into the future. This is a positive number, but the level of their conviction varies by age. Although less than a quarter of the 55+ age group surveyed have made changes since lockdown began, an impressive 94% of them believe they will be able to keep up the changes they have made. The 45-54 age group aren't far behind, but, although the 16-24 year olds have made the most changes since lockdown, they're the group least likely to think these new habits are sustainable.

The **pandemic** has **focused more people** on looking at their **lifestyle** and making potentially **long-lasting changes**.

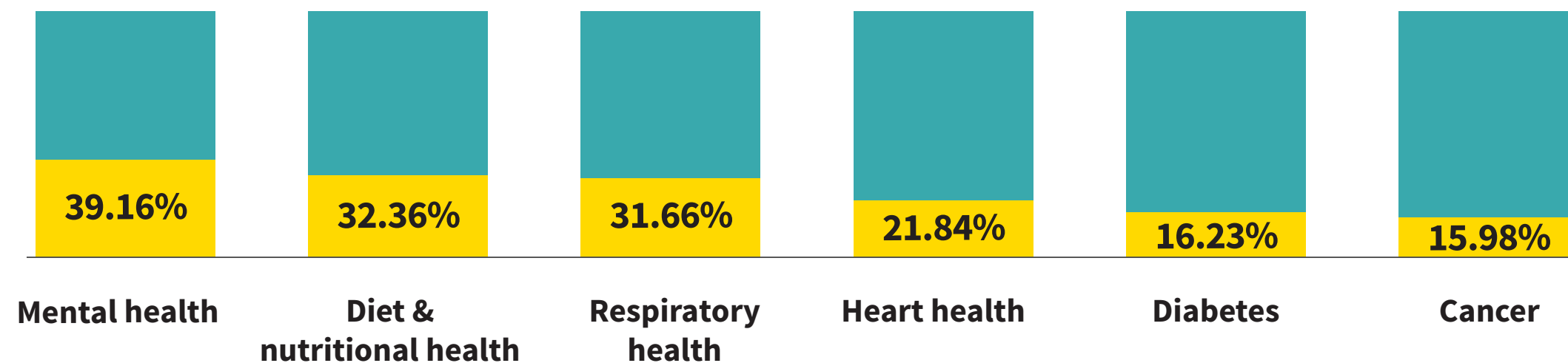


Thought 1: A new relationship with our health

How are we viewing the health of ourselves and our family during the pandemic?

Respondents were asked if the pandemic has changed the way they feel about their overall health. Over a third are more concerned about their **respiratory health** than they were before the pandemic - not surprising given the respiratory implications of COVID-19. But it's **mental health worries** that are most prevalent, a trend that can be seen across all age groups.

Conditions causing greater concern now than before the pandemic



People may need **support** with **looking** after **family members** as well as their **own health**.

Respondents are also worried about family members, particularly their parents, with nearly a third expressing concern for their parents' health. Those in the 35-44 age group expressed the highest level of concern and have worries about their children too. As many people in this age group are likely to fall into the 'sandwich generation' - those caring for children and parents simultaneously - it's not surprising that they're feeling the strain, especially at a time when family contact is often restricted.

Across employment sectors, those identifying as home makers seem to have a greater degree of worry about all members of their family - parents, children and spouse - whereas those in full or part-time work are more specifically concerned about their parents. So, it seems the home makers in particular may need extra support to make time for their own wellbeing when they're worrying about everyone else.

Thought 1: A new relationship with our health

We're worried about our mental health

Over half of respondents feel that COVID-19 has either **significantly** or **somewhat** impacted their **mental health**. The most worried-about mental health issues were **overall stress**, followed by **sleep quality**, **financial worries** and concerns over **physical health**.

The **younger generation** surveyed (16-24) were more affected by this, with more than twice as many as those aged 55+ citing mental health concerns. We saw the same trend in our

'**Age of Ambiguity**' report* which found that the impact on young workers was most significant. This was largely attributed to long periods of working from home, missing out on social interaction with colleagues and risk of unemployment.

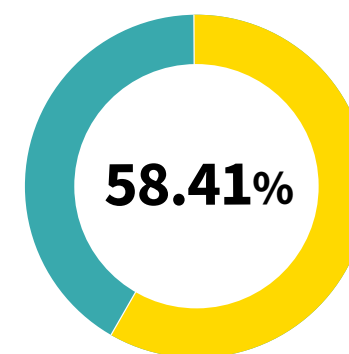
Although our survey found that women had more mental health worries than men, when asked about their biggest non-COVID health concern, **27%** of all respondents chose their **mental health**.

What are we doing to help manage our mental health?

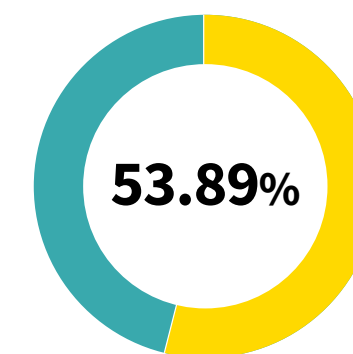
Just under **four out of ten people** surveyed are finding that **exercise** helps their mental health, but nearly the same number also admitted to doing nothing at all to take care of their mental wellbeing. And even though **25%** of women say that their children's mental health has been affected, this

may not be translating into action to help improve it. It's worrying to find that usage of mental health support services has dropped by 38.5% for our respondents during the pandemic, despite the evidence that mental health is a concern.

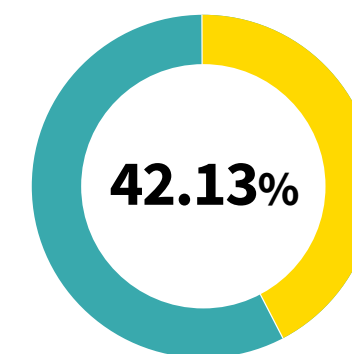
How COVID-19 is impacting our mental health



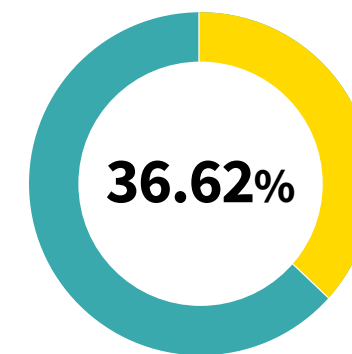
Overall stress



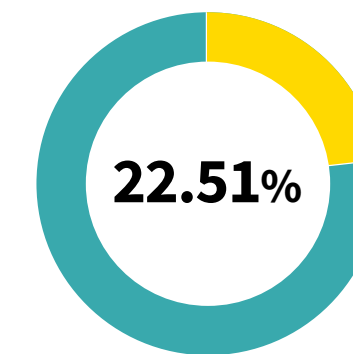
Sleep quality



Financial worries



Concerns about physical health



Juggling work and home life

*'Embracing the Age of Ambiguity - Re-invigorating the workforce in a rapidly evolving world'. Aviva research conducted by Quadrangle, February 2020 and August 2020.

Thought 1: **A new relationship with our health**

“ Modern life puts many strains upon our wellbeing, but for many of us the pandemic has created health issues we would never have anticipated. People have had little time to physically and, more importantly, mentally adapt to the new situation. We all react differently in times of uncertainty and many have been left feeling anxious, lonely and isolated. Unfortunately, mental health support is not currently meeting demand, and we know demand has increased further during the pandemic. ”

Dr Subashini M,
Associate Medical Director, Aviva



Thought 1: A new relationship with our health

Conclusion

The pandemic has triggered lifestyle changes in some people and not in others. Some will continue their healthier lifestyles and some will find them harder to maintain, but overall there isn't much change in concerns about other health conditions. The exception to this is mental health, where people are concerned about it but aren't necessarily doing anything about it.

Clear as mud then!

It may seem as if there are no clear conclusions to draw here, but sometimes we just need to look at it differently. The pandemic has increased our concern for the health of our parents, who may be more vulnerable due to their age. The older generation themselves don't appear to share this concern – but despite a smaller number making changes to their physical health, they are confident they'll be able to embed those changes in their lives in the long-term.

The youngest group questioned, aged 16-24, seem to have contradictory views about their health. They have made the most effort to become healthier and are the most concerned about their long-term health but are the least likely to feel they will be able to sustain these new habits. Perhaps the changes they have made are too drastic to be sustainable, or maybe they struggle to envisage how to continue such a focus on

their health when life gets back to “normal”. With the potential for further restrictions on our daily lives, this group may need support adapting their health goals to be successful in a constantly changing landscape.

So it's clear from the research that mental health is a big concern amongst all age groups, and the risk of further restrictions will no doubt exacerbate this concern. Despite nearly 40% of respondents finding that exercise helps their mental health, the same number haven't made any changes that might aid their mental wellbeing. In addition, a quarter of women believe their children's mental health has been affected by the pandemic.

There's no question we worry about the mental health of ourselves and our loved ones. For people struggling with their mental health, the condition itself can make it very difficult to seek help. But by taking these steps, the next hurdle may be establishing where those steps might take you - where do you go to get help?



Thought 2: The role of digital support

Digital channels play an ever-increasing role in our daily lives. From **shopping** and **banking** to entertainment and consuming information, there's a digital solution on hand. **COVID-19** may have accelerated this digital usage as we find ourselves cut off from other mediums, and our **health** and **wellbeing** is no exception. Digital health solutions could provide an alternative source of support, reducing the need to seek treatment at a time when **NHS waiting times are predicted to rise** – something at the forefront of people's minds.

Waiting times are a concern

With health services working to capacity to handle **COVID-19 cases**, it's no surprise nearly **84%** of survey respondents believe there will be increased waits for diagnosis and treatment for non-emergency issues as a result of **COVID-19**.

Although the 55 and over age group surveyed are the strongest believers that there will be an increase in waiting times, it's the 16-44 year olds who are more worried about it. In fact, **a quarter** of all respondents agree to being **“very worried”** about such potential delay, with another 53% being **“a bit worried”** - an indication that needing to wait longer for medical treatment is a concern for a large number of people.

How can digital services help?

Our research found that digital support services are playing a role in helping people take care of their overall health, whether that's helping to prevent illness and reduce the need for future treatment or finding specific treatment support online. Over a third of people told us they would look to use a digital channel to get help with minor health issues,

and just over a fifth would seek mental health support digitally. We found 43% said they'd be willing to start using a digital health app in the future, with current usage up **9%** since before the pandemic. This is perhaps an indication that, as people build familiarity and trust, health apps could be embraced as fully as those apps used to support other aspects of our lives.

There's a wealth of health-focused digital resources out there, encompassing everything from mindfulness, food-tracking and exercise tips to medical support.. These tools could be instrumental in keeping people healthy in mind and body, both in terms of prevention and treatment.

This **“at your fingertips”** support and interaction could help people take control of their health and wellbeing, allowing them to manage their concerns and potentially reduce the need for treatment in the future. Not only could this relieve the pressure on the NHS, it could also alleviate people's concerns about going to busy public places for help.

Are you worried about increased waits for NHS diagnosis and treatment?

78.81%
YES

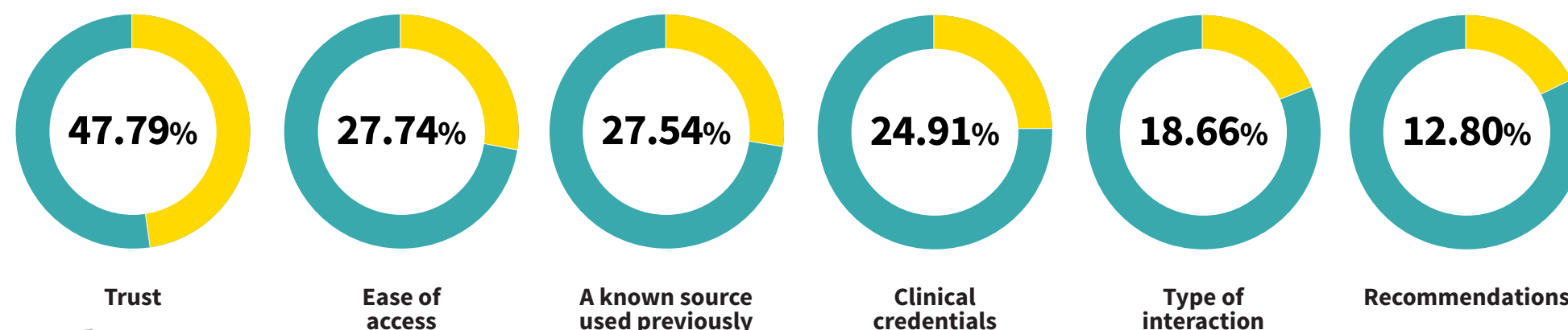
21.19%
NO



Thought 2: The role of digital support

What's important when seeking information?

We found that the **internet** is the **second most turned to place** for information for our respondents. **Trust** in sources came out on top as the most important factor when seeking information, particularly for those in the 55+ age group. In an increasingly digital world, it's easy to understand why almost half our respondents felt this way. **Ease of access**, a known source used before, clinical credentials and the type of interaction were also influencing factors.



However, it's interesting to see that, whilst trust is hugely important, the type of interaction doesn't feature so strongly. This suggests that if people aren't too concerned about the medium of information, they may be more open to using a digital service from a provider they trust, whether that's to seek preventative help or treatment for an existing condition.



Thought 2: The role of digital support

The value of digital solutions

“ The COVID 19 pandemic has highlighted more than ever the value of digital solutions for the delivery of healthcare. This does not mean a reduction in service, just a different way of doing things and applying new thinking to deliver innovative health and wellbeing solutions using intuitive consumer app interfaces. The digital transformation of primary care may prove to be one of the silver linings arising from this pandemic. ”

Dr Bippon Vinayak,
Executive Chairman and co-founder, Square Health



Conclusion

The impact of COVID-19 is affecting all aspects of our health, not just those relating to the virus. Balancing our mental health needs with our physical wellbeing means that we're likely to look beyond the doctor's surgery for help. Digital tools offer that reassurance, accessible from our homes.

Of course, there will always be a need for face-to-face contact, but digital solutions can be a complementary option that work alongside more traditional methods. They give us accessibility and choice when it comes to preventing illness and managing our health and wellbeing.



Thought 3: Prevention is the best medicine

We've discussed the role of **prevention** throughout this report, so what can we do to **take control** of our **health** and **prevent** problems before they happen? Has **COVID-19** made us want to find out more about **potential health conditions** that we could treat or **pre-empt**, perhaps avoiding the need for treatment at all?

Taking preventative measures and staying healthy

We surveyed our customers earlier in the year* to ask about a range of potential health services that might appeal to them. **A health check that could be done at home** came out on top, with **69%** saying it was the benefit they liked the most. This preventative aspect appealed to our respondents, with wellbeing and nutrition services also scoring highly.

In our latest research, 60% of respondents haven't had a health check in the past 12 months – not a particularly surprising figure given that health checks are generally offered at certain ages or through private healthcare. But with nearly **half of respondents** saying they are more likely to take up the opportunity for a free health check now than they were before the pandemic, it appears that an appetite to take control of our own health is growing.

Conclusion

Whoever coined the phrase "**prevention is better than cure**" knew what they were talking about! Perhaps knowing that anyone (regardless of age or health) can contract COVID-19 has made us all think about what we can do to pre-empt potential, avoidable health issues.

A health check could be one way to identify valuable early warning signs, allowing us to focus on the areas of our health which may need more attention.

Of those who have had a health check, this number was greatest in the **16-24** age group, indicating that this age group have a keen interest in prevention when it comes to their health.

When asked how interested they would be in having certain conditions checked for in a health check, 75% of respondents chose **cholesterol** as the thing they were either very or somewhat interested to know about. They were also interested in their **bone health, liver and kidney health** and **glucose**. Clearly, people are starting to show a keen interest in how they can take preventative measures to keep themselves well, especially concerning conditions that are difficult to identify.

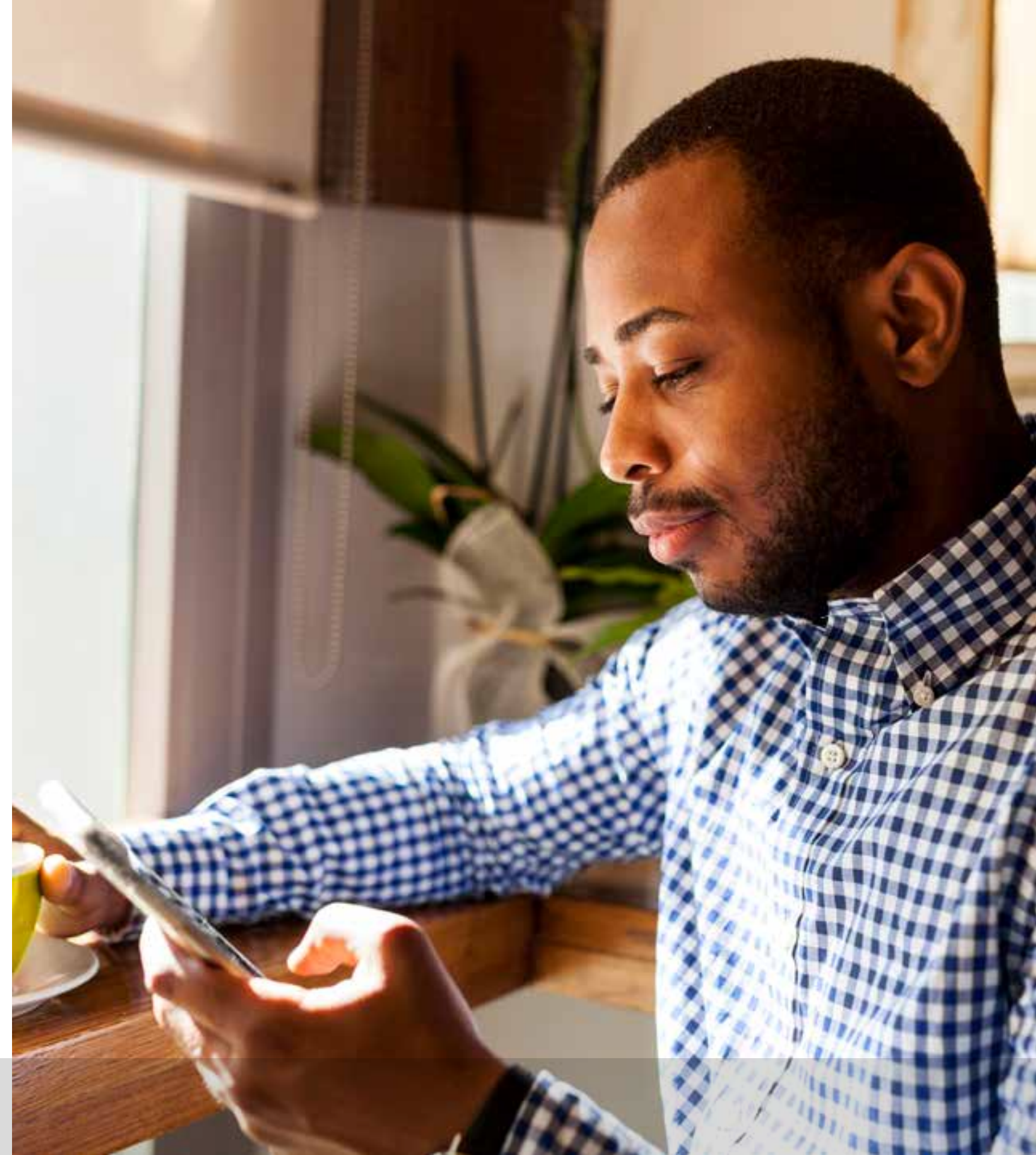


Closing thoughts

“ We give our cars an annual MOT, but do we do the same for our physical and mental wellbeing? The traditional “wait and see” attitude to our health is becoming increasingly unpopular. In the past, we’ve generally been content to restrict our interest in health and medical appointments to times when we felt significantly unwell. This appears to be changing, for example with most respondents welcoming the idea of having an annual health check. The younger age group seem to have already embraced this approach, indicating an awareness that waiting for something to go wrong isn’t the most effective way to stay healthy.

With regular wellbeing and nutritional advice also scoring highly in our survey, we can see that looking after our health on a day-to-day basis is a key aspect in the way we’d choose to live our lives. Of course, anyone can be unfortunate enough to contract a serious health condition, but our research shows that through COVID-19, perhaps we’re starting to understand the benefits of maintaining a healthier lifestyle and taking a greater interest in preventing ill health. Keeping healthy can help prevent many conditions developing, for example diabetes, but it might also better prepare us to be able to cope with any serious health issues that may arise in the future. ”

Paul Brencher,
Managing Director, Individual Protection, Aviva



Censuswide:

Polling 2,015 nationally representative respondents between 26.08.20 – 01.09.20

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